



**Securities Transfer Request Form**

**Step One:** Shares can be transferred directly from your brokerage account to the Coastal Land Trust's account. Complete the top section of this form and send a copy to your broker.

Date: \_\_\_\_\_

To: \_\_\_\_\_ (Your Broker's Name)  
\_\_\_\_\_  
\_\_\_\_\_  
(Brokerage Firm)  
(Broker's Phone Number)

From: \_\_\_\_\_  
(Donor Name)

Please accept this letter as your authorization to irrevocably transfer:

Name of stock: \_\_\_\_\_

Number of shares: \_\_\_\_\_

Which you hold in the name of: \_\_\_\_\_  
(Account title at brokerage firm)

From (your) account number: \_\_\_\_\_

Signature(s) of account owner(s): \_\_\_\_\_

Please transfer to the Coastal Land Trust's account via DTC as follows:

DTC: 0141 Wells Fargo Advisors

Account Name: North Carolina Coastal Land Trust Account 4780-6130

Broker Contact:

David Brownlow; 910-509-5252; [david.brownlow@WellsFargoAdvisors.com](mailto:david.brownlow@WellsFargoAdvisors.com)

Coastal Land Trust: Tax ID #56-1791849

-----

**Step Two:** We kindly ask that you notify the Coastal Land Trust when making a stock transfer. Please email the following information to Marlo Brooks [marlo@CoastalLandTrust.org](mailto:marlo@CoastalLandTrust.org) or call her at 910-790-4524 x2040

We need the following information:

- 1) The name of stock and the number of shares being transferred
- 2) Your preferred name and mailing address for acknowledgement of the gift and tax receipt
- 3) If the gift is for a purpose other than general support, please specify

**Thank you!**